Public Workshop

May 25, 2023

Workshop Objectives

- Provide an overview of the Annual Operating Report (AOR) and current challenges.

- Discuss objectives of the AOR Study and explore an alternative concept of collecting data for future reports.

- Gather public input.

Meeting Rules

- This is a **_public_** meeting under Florida's Government in the Sunshine Act.

- This meeting is being recorded.

- All audio and phone lines are muted.

- Following the presentation, participants are invited to provide public comments.

- Webinar speakers must unmute their line when called on by the facilitator.

- Phone participants will be instructed on unmuting their phone lines.

- All public comments are limited to 5 minutes per speaker.

Annual Operating Report (AOR) Study

Presented by Thomas Howell Ferguson

"In God we trust. All others must bring data."

W. Edwards Deming

The Assembly Line: A Case Study of Quantity vs Quality

Efficiency was the primary goal of the American assembly line in the 1950s:

- Workers were instructed to "keep the line moving"
- Quality was the responsibility of management and inspectors

Quality was the primary goal of the Japanese assembly line in the 1950s:

- All employees were responsible for the quality of the product
- Workers were instructed to stop the line if there was a problem with the product

Background on AOR

Annual — Each year, CTD collects data on transportation operations related to serving the TD population.

CTCs — The data is reported by Community Transportation Coordinators (CTCs) to CTD

System — Data includes trip totals across the TD system and other performance indicators from the previous state fiscal year.

Report — CTD compiles AOR data within its Annual Performance Report (APR), submitted to the Governor and Legislature each year.

Why does CTD collect AOR data? Statute

Annual: "CTD must submit an annual report to the Governor, Speaker of the House, and President of the Senate by January 1st of each year (427.013(12))."

CTCs: CTCs must "collect annual operating data" and submit to the CTD (427.0155(2)).

System: CTD must "compile all available information on the transportation operations for and needs of the transportation disadvantaged in the state" (427.013(1)).

Report: The Annual Performance Report (APR) currently satisfies this statute

Study **Purpose** and **Objectives**

The Commission for the Transportation Disadvantaged (CTD) is conducting a study to improve the __accuracy__ and __analyses__ of performance __data__ reported in the AOR

Objective 1:
ASSESS

The CTD will examine the current role of the AOR, including the process used to collect and report performance data each fiscal year. This will help identify both the strengths of the current system and the areas in need of future improvement.

Objective 2:
VERIFY

The CTD will identify strategies that can assist CTCs in reporting accurate and consistent data within the AOR. This is critical to the third objective of performing analyses and capturing accurate service trends year-over-year.

Objective 3:
ANALYZE

The CTD will explore ways AOR data can be used to evaluate coordination of TD services. For purposes of this study, "coordination" is defined as the services being delivered directly by CTCs (in addition to what are funded by the T&E Grant), including paratransit trips and bus pass programs serving TD riders.

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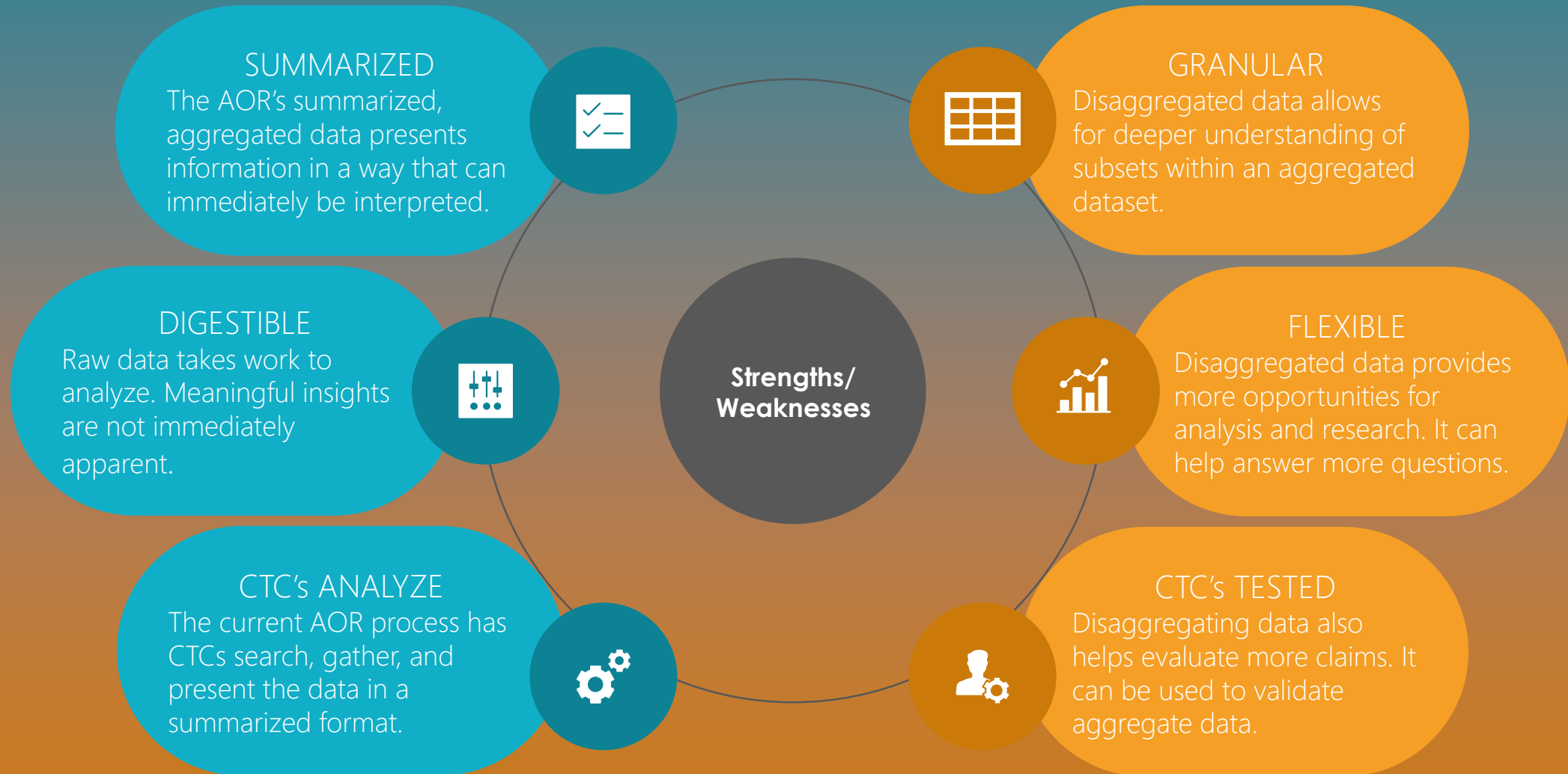
Indian River 2021-2022 AOR (Example)

The AOR collects aggregated trip data by fields such as "Trip Purpose" and "Revenue Source", among others.

Aggregated data is just a set of calculations on top of raw data that exists at a more granular level. In this sense, data submitted by CTC's in the AOR is more analysis than it is pure data.

Aggregated data represents a summary of disaggregated data. In this case, 61,377 individual trips (the disaggregated data) are aggregated (summarized) by:

1. Type of Service
2. Trip Purpose
3. Revenue Source
4. Provider Type

County: Indian River
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Demographics	Number
Total County Population	158,002
Unduplicated Head Count	4,021

Trips By Type of Service	2020	2021	2022
Fixed Route (FR)	0	0	0
Deviated FR	0	0	0
Complementary ADA	27,743	24,422	32,900
Paratransit	60,865	33,198	28,477
TNC	0	0	0
Taxi	0	0	0
School Board (School Bus)	0	0	0
Volunteers	0	0	0
TOTAL TRIPS	88,608	57,620	61,377

Passenger Trips By Trip Purpose	2020	2021	2022
Medical	21,141	21,364	25,005
Employment	449	487	5,312
Ed/Train/DayCare	48,339	21,300	18,731
Nutritional	0	0	0
Life-Sustaining/Other	18,679	14,469	12,329
TOTAL TRIPS	88,608	57,620	61,377

Passenger Trips By Revenue Source	2020	2021	2022
CTD	15,401	16,767	13,834
AHCA	0	0	0
APD	45,044	14,747	12,480
DOEA	0	0	0
DOE	0	0	0
Other	28,163	26,106	35,063
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Trips by Provider Type	2020	2021	2022
CTC	32,218	24,422	32,900
Transportation Operator	10,926	16,767	13,834
Coordination Contractor	45,464	16,431	14,643
TOTAL TRIPS	88,608	57,620	61,377

Vehicle Data	2020	2021	2022
Vehicle Miles	490,779	397,098	514,407
Roadcalls	6	3	5
Accidents	1	0	1
Vehicles	116	83	62
Drivers	97	68	58

Financial and General Data	2020	2021	2022
Expenses	$ 2,395,524	$ 2,164,752	$ 2,639,210
Revenues	$ 2,293,677	$ 2,296,872	$ 3,166,256
Commendations	5	15	16
Complaints	29	13	13
Passenger No-Shows	1,409	819	207
Unmet Trip Requests	34	21	7

Performance Measures	2020	2021	2022
Accidents per 100,000 Miles	0.20	0.00	0.19
Miles between Roadcalls	81,796	132,366	102,881
Avg. Trips per Passenger	29.20	18.15	15.26
Cost per Trip	$27.04	$37.57	$43.00
Cost per Paratransit Trip	$27.04	$37.57	$43.00
Cost per Total Mile	$4.88	$5.45	$5.13
Cost per Paratransit Mile	$4.88	$5.45	$5.13

Aggregated vs Disaggregated Data

Strengths/Weaknesses

SUMMARIZED
The AOR's summarized, aggregated data presents information in a way that can immediately be interpreted.

DIGESTIBLE
Raw data takes work to analyze. Meaningful insights are not immediately apparent.

CTC's ANALYZE
The current AOR process has CTCs search, gather, and present the data in a summarized format.

GRANULAR
Disaggregated data allows for deeper understanding of subsets within an aggregated dataset.

FLEXIBLE
Disaggregated data provides more opportunities for analysis and research. It can help answer more questions.

CTC's TESTED
Disaggregating data also helps evaluate more claims. It can be used to validate aggregate data.
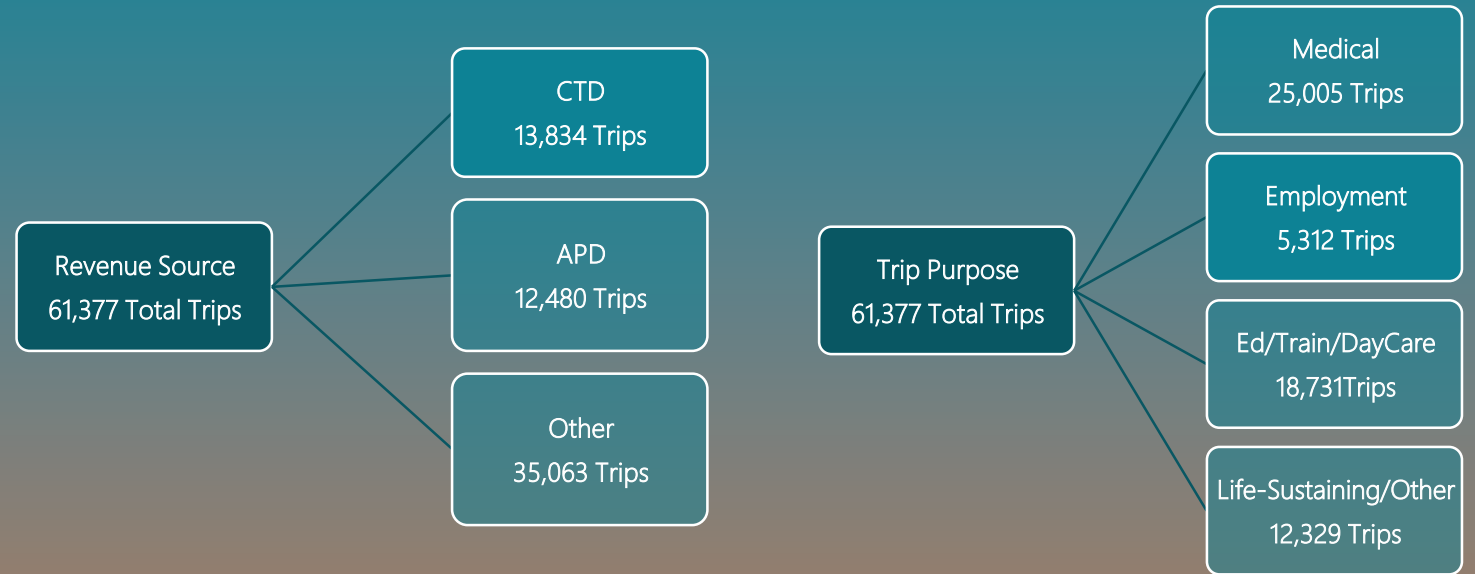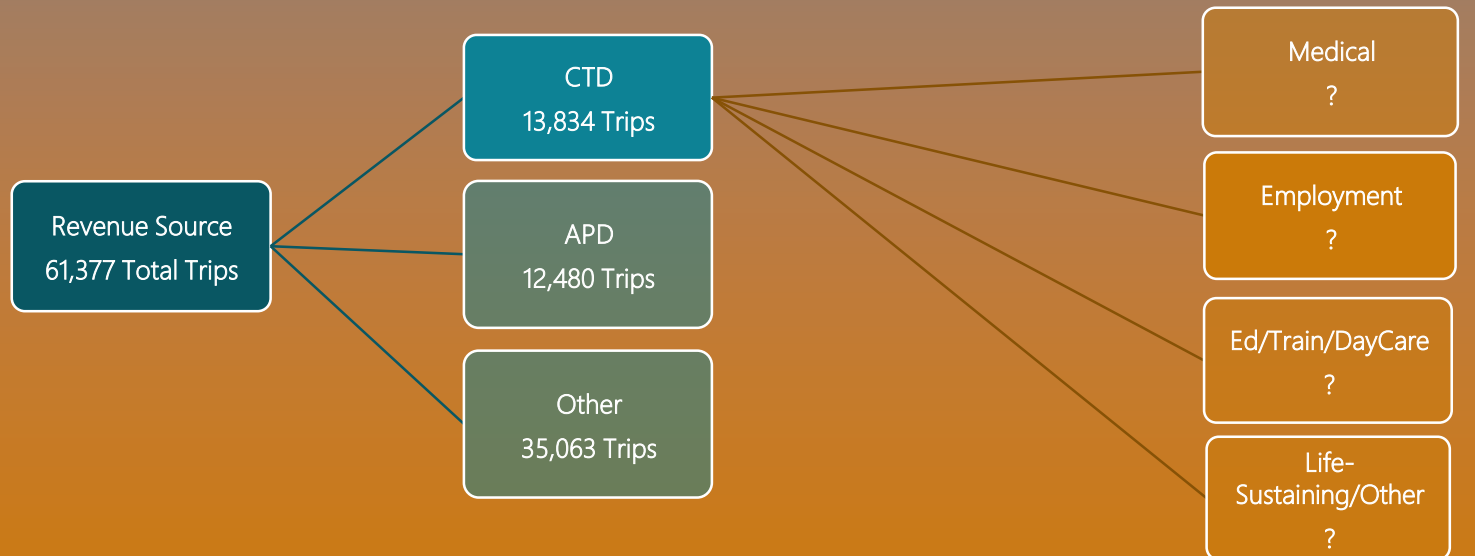
Aggregated vs Disaggregated Data

An example <u>strength</u> of the AOR's aggregated form of data is how (in Indian River's case in 2021-2022) it is immediately apparent how many trips were funded by CTD (13,834 trips) and how many trips there were for the purpose of employment (5,312 trips).

Revenue Source
61,377 Total Trips

- CTD
13,834 Trips
- APD
12,480 Trips
- Other
35,063 Trips

Trip Purpose
61,377 Total Trips

- Medical
25,005 Trips
- Employment
5,312 Trips
- Ed/Train/DayCare
18,731Trips
- Life-Sustaining/Other
12,329 Trips

An example <u>weakness</u> of the AOR's lack of disaggregation of data is how (again, in Indian River's case) it is impossible to determine how many CTD trips were for the purpose of employment. Data is aggregated by Funding Source and by Trip Purpose, but not disaggregated by any combination of the two.

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?
- Employment
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Indian River 2021-2022 AOR

The only figures that can be verified for accuracy within the AOR itself are the summary totals against one another. But there is no audit trail for these summarized totals.

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Using CTD Invoices as Analogy

Florida Commission for the Transportation Disadvantaged
Trip Summary Data Report

CTC: Thomas Howell Ferguson CTC

County(ies): Florida County

Dates of Services: April 1, 2023 to April 30, 2023

Mode	Number of Trips	Number of Miles
Ambulatory	500	2000
Wheelchair	300	700
Stretcher	50	100
Group Per Passenger	150	200
Group Per Group		
Total	1000	3000

Bus Pass Type	Number of Bus Passes Issued
Daily	
Weekly	
Monthly	

By submission of this form, Grantee certifies the information provided on this Trip Summary Data Report is accurate and accountable and corresponds with the supporting back-up documentation. All individuals included in the supporting back-up documentation have a Transportation Disadvantaged application on file and the individuals have been determined eligible for services rendered.

Revised 07/01/2021

"The Trip Summary Data Report provides a summary of the invoice back-up documentation. This report must be submitted with the invoice and detailed back-up documentation in order for the invoice to be processed by the Commission. Data provided on this form must match data provided on the back-up documentation."

— *COMMISSION FOR THE TRANSPORTATION DISADVANTAGED INVOICING PROCEDURES FOR THE PROVISION OF TRANSPORTATION AND CAPITAL EQUIPMENT. July 1, 2017. p. 6*

Using CTD Invoices as Analogy

| Thomas Howell Ferguson CTC | | | | April 1, 2023 to April 30, 2023 | | | | | Ambulatory | |
Date	Name	Cost	Mode	Pick Up Time	Origin Address	Origin City	Drop Off Time	Destination Address	Destination City	Miles
4/1/2023	John Doe	40.00	Ambulatory	7:18	1234 Tally Way	Tallahassee	7:39	4321 Other Way	Tallahassee	14.54
4/1/2023	Jane Doe	40.00	Ambulatory	7:25	1234 Tally Way	Tallahassee	7:49	4321 Other Way	Tallahassee	1.30
4/1/2023	John Doe	40.00	Ambulatory	7:01	1234 Tally Way	Tallahassee	7:16	4321 Other Way	Tallahassee	0.32
4/1/2023	Jane Doe	40.00	Ambulatory	7:14	1234 Tally Way	Tallahassee	7:44	4321 Other Way	Tallahassee	0.78
4/1/2023	John Doe	40.00	Ambulatory	7:18	1234 Tally Way	Tallahassee	7:37	4321 Other Way	Tallahassee	1.40
4/1/2023	Jane Doe	40.00	Ambulatory	7:57	1234 Tally Way	Tallahassee	8:22	4321 Other Way	Tallahassee	0.45
4/1/2023	John Doe	40.00	Ambulatory	7:03	1234 Tally Way	Tallahassee	7:19	4321 Other Way	Tallahassee	0.87
4/1/2023	Jane Doe	40.00	Ambulatory	6:39	1234 Tally Way	Tallahassee	6:50	4321 Other Way	Tallahassee	0.07
4/1/2023	John Doe	40.00	Ambulatory	7:17	1234 Tally Way	Tallahassee	7:41	4321 Other Way	Tallahassee	0.33
4/1/2023	Jane Doe	40.00	Ambulatory	7:33	1234 Tally Way	Tallahassee	7:46	4321 Other Way	Tallahassee	0.79
4/1/2023	John Doe	40.00	Ambulatory	6:42	1234 Tally Way	Tallahassee	6:55	4321 Other Way	Tallahassee	0.83
4/2/2023	Jane Doe	40.00	Ambulatory	7:21	1234 Tally Way	Tallahassee	8:03	4321 Other Way	Tallahassee	0.92
4/2/2023	John Doe	40.00	Ambulatory	6:44	1234 Tally Way	Tallahassee	6:56	4321 Other Way	Tallahassee	1.14
4/2/2023	Jane Doe	40.00	Ambulatory	7:25	1234 Tally Way	Tallahassee	8:04	4321 Other Way	Tallahassee	0.82
4/2/2023	John Doe	40.00	Ambulatory	7:16	1234 Tally Way	Tallahassee	7:42	4321 Other Way	Tallahassee	0.09
4/2/2023	Jane Doe	40.00	Ambulatory	7:28	1234 Tally Way	Tallahassee	7:51	4321 Other Way	Tallahassee	1.48
4/2/2023	John Doe	40.00	Ambulatory	9:34	1234 Tally Way	Tallahassee	10:12	4321 Other Way	Tallahassee	0.07
4/2/2023	Jane Doe	40.00	Ambulatory	12:45	1234 Tally Way	Tallahassee	14:07	4321 Other Way	Tallahassee	0.53
4/2/2023	John Doe	40.00	Ambulatory	9:31	1234 Tally Way	Tallahassee	10:31	4321 Other Way	Tallahassee	1.37
4/2/2023	Jane Doe	40.00	Ambulatory	10:59	1234 Tally Way	Tallahassee	11:55	4321 Other Way	Tallahassee	0.67
4/2/2023	John Doe	40.00	Ambulatory	9:18	1234 Tally Way	Tallahassee	10:17	4321 Other Way	Tallahassee	0.68
4/2/2023	Jane Doe	40.00	Ambulatory	11:16	1234 Tally Way	Tallahassee	12:34	4321 Other Way	Tallahassee	0.44
4/2/2023	John Doe	40.00	Ambulatory	11:25	1234 Tally Way	Tallahassee	12:16	4321 Other Way	Tallahassee	0.95
4/3/2023	Jane Doe	40.00	Ambulatory	14:36	1234 Tally Way	Tallahassee	16:16	4321 Other Way	Tallahassee	0.93
4/3/2023	John Doe	40.00	Ambulatory	14:21	1234 Tally Way	Tallahassee	15:06	4321 Other Way	Tallahassee	0.38
4/3/2023	Jane Doe	40.00	Ambulatory	6:41	1234 Tally Way	Tallahassee	7:06	4321 Other Way	Tallahassee	1.49
4/3/2023	John Doe	40.00	Ambulatory	10:45	1234 Tally Way	Tallahassee	10:58	4321 Other Way	Tallahassee	0.74
4/3/2023	Jane Doe	40.00	Ambulatory	7:29	1234 Tally Way	Tallahassee	7:55	4321 Other Way	Tallahassee	0.47

"The Grantee must provide the following supporting documentation for reimbursement which identifies specific trips designated as eligible for the Transportation Disadvantaged Trust Fund. The Grantee shall provide sufficient documentation for each cost or claims for reimbursement to allow an audit trail to ensure that the services rendered or costs incurred were for those that were provided."

— *COMMISSION FOR THE TRANSPORTATION DISADVANTAGED INVOICING PROCEDURES FOR THE PROVISION OF TRANSPORTATION AND CAPITAL EQUIPMENT. July 1, 2017. p. 8*

AOR History with T&E Grant Funding

Prior to FY21-22, CTD Trip & Equipment (T&E) Grant funding was allocated based on total trips and miles in the AOR, including coordination contractors and third-party agencies.

In 2020, a CTD study identified concerns with inconsistencies in gathering and reporting AOR data from 60 different sources.

As a result, the CTD removed the AOR from the funding methodology and replaced it with invoice data collected through the T&E Grant.

The study recommended re-evaluating the role of the AOR in measuring the performance of the broader Coordinated TD System.

The AOR remains a statutory requirement for CTCs and is compiled in the CTD's Annual Performance Report.

AOR History with T&E Grant Funding

"In my several years in Business Development for MV Transportation as well as Senior Staff member of the Commission for the Transportation Disadvantaged, I have reviewed countless Annual Operating Reports and have been dismayed at the lack of consistent, accurate data that is submitted. Particularly in smaller, not for profit agencies serving as the Community Transportation Coordinator (CTC), I have observed wide swings in reporting data from year to year and disparities on how certain categories are interpreted for submission of data . . . There **does not exist a thorough examination or audit of this data**, and disparities are not aggressively challenged by the CTD. The result of this is that when using AOR data for two of the four subsets of TD allocation distribution we are relying on data that has not been clearly vetted and verified, making the process inherently flawed."

— *Florida Commission for the Transportation Disadvantaged Funding Allocation Study, Fiscal Year 2020, APPENDIX – E (PUBLIC FEEDBACK) p.92*

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Annual Performance Report Executive Summary

"Each year, CTD presents a report to the Governor and Legislature on the Coordinated System's performance in serving the TD population during the previous state fiscal year . . . The content and datasets within this report provide two distinct, but coinciding perspectives:

1) A **macro-level, systemwide** overview of the services provided by the Coordinated System, captured in each county's Annual Operating Report (AOR); and

2) A **micro-level, programmatic** overview of services funded by CTD, which support trips "not sponsored" by any other agency within the Coordinated System."

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Accidents per 100,000 Miles	0.20	0.00	0.19
Miles between Roadcalls	81,796	132,366	102,881
Avg. Trips per Passenger	29.20	18.15	15.26
Cost per Trip	$27.04	$37.57	$43.00
Cost per Paratransit Trip	$27.04	$37.57	$43.00
Cost per Total Mile	$4.88	$5.45	$5.13
Cost per Paratransit Mile	$4.88	$5.45	$5.13

This aggregated format can tell us how many CTD trips there are (13,834) and how many trips were for the purpose of employment (5,312). But it can't tell us how many CTD trips were for the purpose of employment.
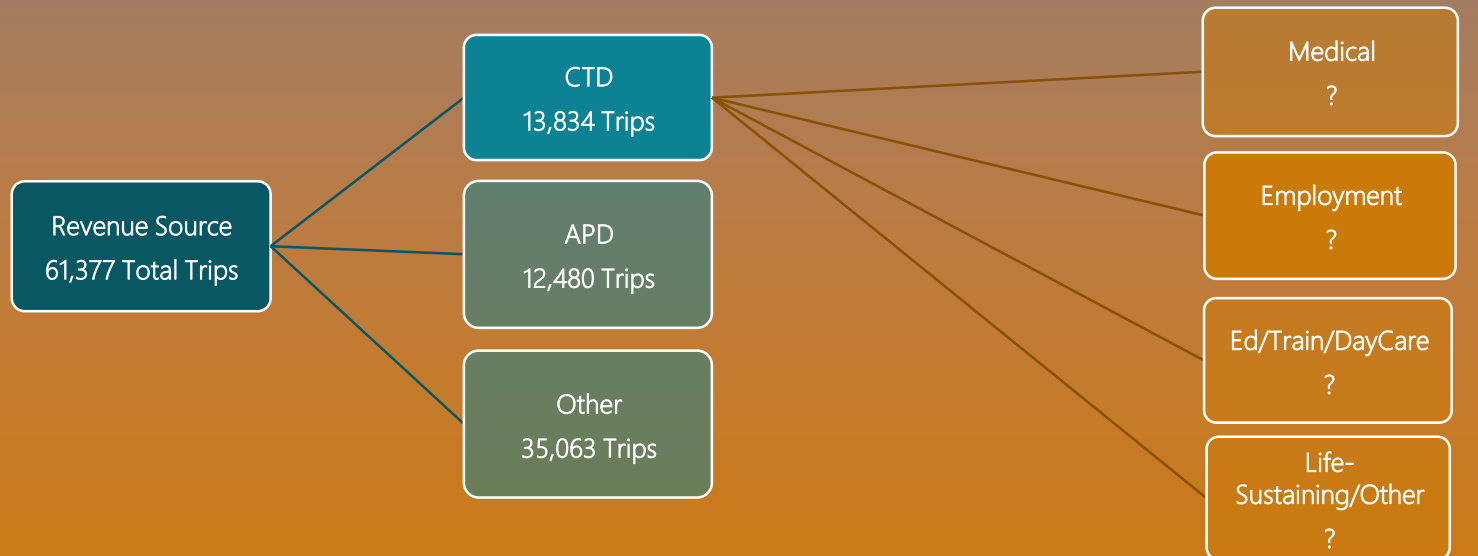
Aggregated vs Disaggregated Data

An example <u>strength</u> of the AOR's aggregated form of data is how (in Indian River's case in 2021-2022) it is immediately apparent how many trips were funded by CTD (13,834 trips) and how many trips there were for the purpose of employment (5,312 trips).

Revenue Source
61,377 Total Trips

CTD
13,834 Trips

APD
12,480 Trips

Other
35,063 Trips

Trip Purpose
61,377 Total Trips

Medical
25,005 Trips

Employment
5,312 Trips

Ed/Train/DayCare
18,731Trips

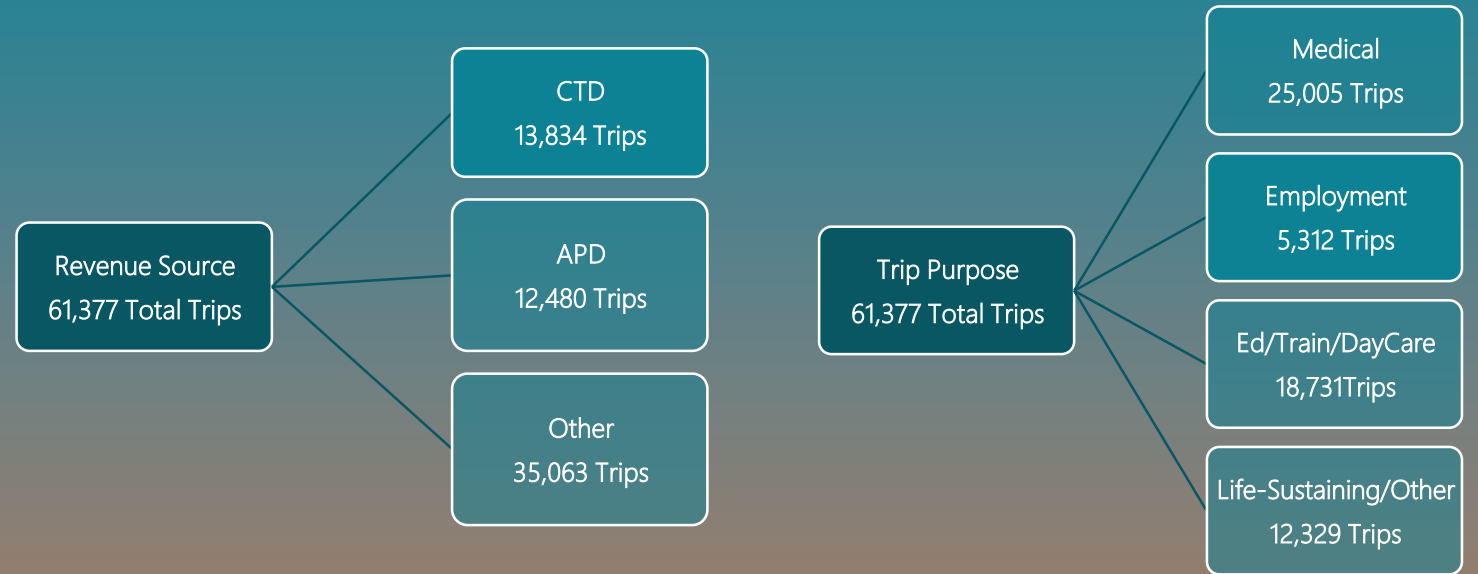Life-Sustaining/Other
12,329 Trips

An example <u>weakness</u> of the AOR's lack of disaggregation of data is how (again, in Indian River's case) it is impossible to determine how many CTD trips were for the purpose of employment. Data is aggregated by Funding Source and by Trip Purpose, but not disaggregated by any combination of the two.

Revenue Source
61,377 Total Trips

CTD
13,834 Trips

APD
12,480 Trips

Other
35,063 Trips

Medical
?

Employment
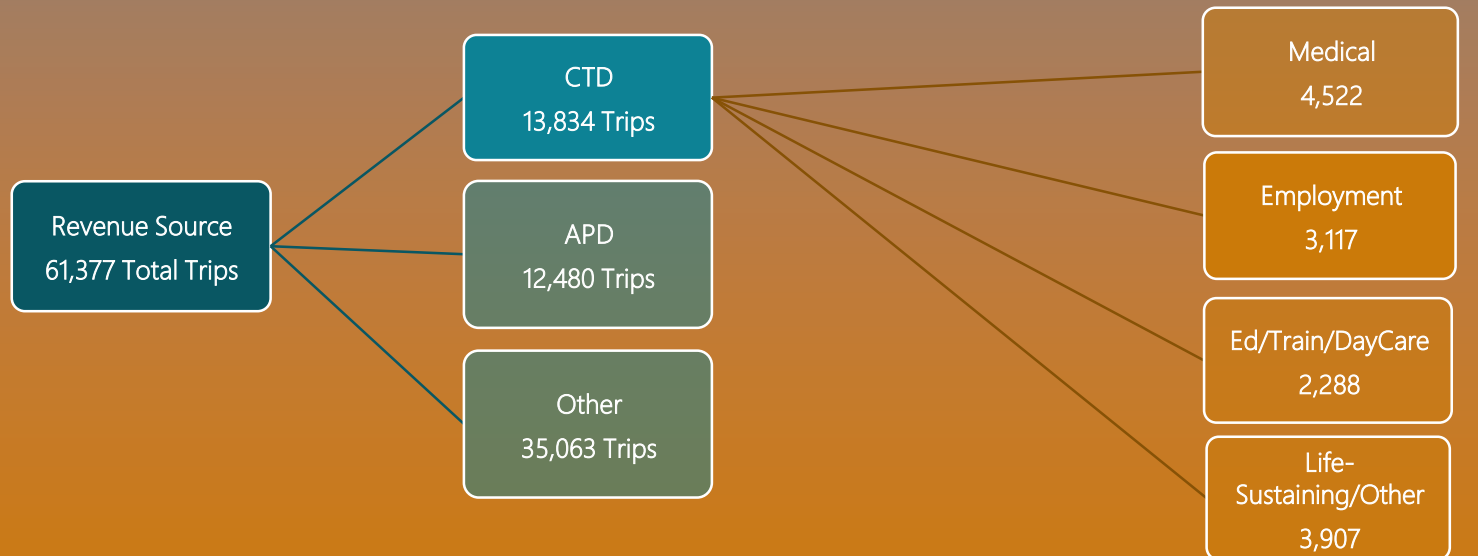?

Ed/Train/DayCare
?

Life-Sustaining/Other
?

Aggregated vs Disaggregated Data

An example strength of the AOR's aggregated form of data is how (in Indian River's case in 2021-2022) it is immediately apparent how many trips were funded by CTD (13,834 trips) and how many trips there were for the purpose of employment (5,312 trips).

Revenue Source
61,377 Total Trips

- CTD
  13,834 Trips
- APD
  12,480 Trips
- Other
  35,063 Trips

Trip Purpose
61,377 Total Trips

- Medical
  25,005 Trips
- Employment
  5,312 Trips
- Ed/Train/DayCare
  18,731Trips
- Life-Sustaining/Other
  12,329 Trips

With the raw AOR data provided by Indian River, Thomas Howell Ferguson was able to answer this particular question of how many CTD trips were for the purpose of employment, as well as others like it.

Revenue Source
61,377 Total Trips

- CTD
  13,834 Trips
- APD
  12,480 Trips
- Other
  35,063 Trips

- Medical
  4,522
- Employment
  3,117
- Ed/Train/DayCare
  2,288
- Life-Sustaining/Other
  3,907

Study Deliverables

- Present an alternative approach to report data in a disaggregated format.
- Request CTC representatives test this approach using their AOR data from FY21-22 (July 1, 2021 – June 30, 2022).
  - Upload data on trips provided by CTCs (do NOT include Coordination Contractors)
  - Data uploaded will NOT be collected by the CTD or saved on the website.
- Request feedback on data test and info presented in this workshop be provided to David Darm by June 16, 2023.
- Compile feedback in a final report and present findings to CTD in August 2023.

Questions for Feedback from Stakeholders

1. As a CTC, how are the reporting requirements of the AOR? Would a simple upload of raw trip data be more work or less work by comparison?

2. Should the summarized AOR data on trip totals for non-CTD programs continue to be reported?

3. Should factors reported in the AOR like trip purpose and passenger type be added as part of the back-up documentation in CTD invoices?

4. How important is it for the AOR data to have an audit trail? Should back-up documentation of specific trips be required, similar to what is required for CTD invoices?

5. Are there alternative ways of verifying the AOR data's integrity? That is, different from collecting back-up documentation on specific trips?

6. Should the AOR data (on CTC trips) be revisited for future study as part of the funding methodology of the Trip & Equipment Grant?

Public Comments

Speakers will be called on in the order requests are received.

Comments are limited to five minutes.

Participants may email their comments to David Darm at: David.Darm@dot.state.fl.us.

Next Steps

- The CTD will post the disaggregated data test page on its website.

- Stakeholders may provide feedback to CTD Executive Director David Darm at: David.Darm@dot.state.fl.us, by June 16, 2023.

- Thomas Howell Ferguson will compile feedback in a final report.

- The final report will be presented at the August Commission Business Meeting.